

**Income Maintenance Advisory Committee**  
**Department of Health and Family Services**  
**Division of Health Care Financing**  
**April 14, 2005**  
**\*Minutes\***

County Attendees: **Jackie Bennett**, Racine Co.; **Lynn Brenner**, Calumet Co.; **Shiela Drays**, Dodge Co.; **Joanne Faber**, Washington Co.; **Tim Gessler**, Winnebago Co.; **Liz Green**, Dane Co.; **Gloria Guitan**, Milwaukee Co.; **Jane Huebsch**, Marathon Co.; **Ed Kamin**, Kenosha Co.; **Doreen Lang**, Wood Co.; **Chris Machamer**, Waupaca Co.; **Luann Page**, Waukesha Co.; **Mike Poma**, Milwaukee Co.; **John Rathman**, Outagamie Co.; **Felice Riley**, Milwaukee Co.; **Amy Roland**, Outagamie Co.; **Shirley Ross**, LaCrosse Co.; **Cindy Sutton**, Rock Co.

State Attendees: **Mary Claridge**, DHFS/BFS; **Bernadette Connolly**, DHFS/BEM; **Sara Edmonds**, DHFS/BEM; **Brian Fangmeier**, DHFS/BEM; **Theresa Fosbinder**, DHFS/BEM; **Jim Hennen**, DHFS/SERO; **Essie Herron**, DHFS/BEM; **Vicki Jessup**, DHFS/BEM; **Jim Jones**, DHFS/BEM; **Cheryl McIlquham**, DHFS/BEM; **Mike McKenzie**, DHFS/BEM; **Amy Mendel-Clemens**, DHFS/BEM; **Scott Reidasch**, DHFS/BEM; **Rick Zynda**, DHFS/BEM

Administrative Items

- March Minutes were approved.
- The Joint Finance Committee (JFC) has been meeting statewide on the 2006 budget, and the Legislative Fiscal Bureau (LFB) is now working on the issue papers for the JFC. LFB will begin posting agendas, with the issue papers up for discussion, on their website.
- Vicki Jessup has been hired as the Supervisor of the new Medicaid Quality Control Unit. This unit is part of the Quality Assurance Section in the Bureau of Eligibility Management. This unit will be responsible for Medicaid quality assurance activities, including Medicaid Eligibility Quality Control (MEQC) special projects and the Payment Error Rate Measurement (PERM) eligibility case reviews, a report now required by federal regulation.

CWW Update

Jefferson and Sauk Counties have been live on the web since February and have transitioned 700-800 cases to the CARES Worker Web (CWW). New case intakes are being handled by these agencies using the CWW. Sauk County has now transitioned about 16% of their caseload, and Jefferson has transitioned a little less than 25% of their caseload. Jefferson and Sauk have made some suggestions for changes to the CWW, and many of these changes will be implemented on April 26<sup>th</sup>.

The next step is for Dane, Rock, and Columbia IM and W2 agencies to begin their transition. CWW training was made available on April 4<sup>th</sup> for the pilot #2 agencies. These agencies will 'go live' with CWW in production on May 2<sup>nd</sup>. Western Region agencies and Dodge County will begin the first roll out with a preparation month in May. A Wisline Web session has been set up and will communicate preparatory information to these agencies. Agencies should be sure that their IT staff have implemented the extra software needed for the CWW training and CWW to assure that training can take place without interruptions.

CWW Kickoff meetings were held in Madison and Wausau, agencies were asked to send a transfer coordinator and backup, along with someone who leads the agency's training effort. Every agency was in attendance at one of the 2 sessions. The Madison session had a total of 125 staff, and 173 attended the

Wausau session. 192 staff who attended a Kick-Off Event completed a follow-up evaluation. Some of the information gathered from the evaluations included:

- Staff would have liked to attend both the transfer and training breakout sessions.
- Some staff thought additional information would have been helpful, while others thought that sufficient information was provided
- The events were well organized
- Presenters were well prepared
- The events demonstrated good collaboration between DHFS and DWD, and also with the local agencies and the Departments

DHFS is recommending that the staff who participated in the CWW Kick-Off and who will have access to the CWW in production, transition up to five cases to help them get used to the CWW. CWW production access will be granted Monday, April 18 for those who submitted the "blue form" from the kickoff event.

Pilot CWW Training is being offered on line and the pilot #2 agencies have begun this training. The final CWW training module will be available on April 18<sup>th</sup>. A **DRAFT** of the pilot assessment will also be made available on the 18<sup>th</sup>. DHFS is piloting the assessment to ensure that the questions are clearly stated and that the knowledge required for successful completion of the assessment has been set at the appropriate level. Using feedback from those taking the pilot assessment, DHFS will revise the assessment taken by those in the regional roll-out agencies. Agencies who encounter problems with the training or the assessment should contact the training call center via the phone numbers provided or can send comments to the IM training mailbox ([imtraining@dhfs.state.wi.us](mailto:imtraining@dhfs.state.wi.us)). Pilot sessions of the CWW review lab have been set up for May 2<sup>nd</sup> and May 5<sup>th</sup> and local agency volunteers are needed to participate in these sessions.

The training staff established a call center for staff needing additional help with the online CWW training. It is going well so far and is receiving about 10 calls per day. Questions received have included PTS learning needs and CWW questions. Now that some of the technical issues with PTS and CWW have been resolved, training staff are looking forward to receiving more feedback on the content of the training. At some point in the next few months, the training and the CARES call centers will be managed via the same phone system.

The on-line CWW training modules have been taking less time than was originally estimated, however, DHFS will continue to give credit for training based on the original estimates per session.

New worker training will be revised to include CWW materials over the summer and IM training resources will be primarily used for this task. Any agencies hiring new staff at this time can contact DHFS to discuss in-house training for these workers in the interim. If you have any issues or ideas on what to add or change in the new worker training please contact Theresa Fosbinder.

### FS Second Party Reviews

At the March 2005, IMAC meeting, Cheryl McIlquham asked the local agencies for information on why the FS second party review completion rates were down. This issue was again discussed. Lynn Brenner noted that the DHFS current second party review requirement is that the agency review two cases per worker per month and that this requirement places a burden on smaller agencies or agencies that have workers that have partial FoodShare caseloads. Lynn suggests that agencies be allowed to choose between a set percentage of its FoodShare caseload or the two per worker per month standard. This would lower the number of cases that need to be reviewed by each agency while still requiring a second party review for a large number of FS cases.

Local agencies also asked that DHFS look into front-end processes that could improve the FS error rate, and help lower the number of back end reviews. New Hampshire has a recently implemented an automated process that requires certain case types be reviewed by the supervisor or QA manager before

they can be confirmed. This is one of several ideas from New Hampshire that DHFS is reviewing. Other ideas included reworking the error prone policies with in the FS program itself, and regional or a central change center. The second party review issue was officially referred to the Quality Assurance Sub-Committee for research and discussion.

### Sub-Committee Reports

- Quality Assurance

See Handout below.

- Program Connections

Since the merging of the IMAC Program and Policy Coordination sub-committee and the C&I Program Connections, this new committee, now called the Program Connections Sub-Committee, has been developing a new mission statement and subcommittee goals. The subcommittee will soon be electing new co-chairs. One of the main focus points for this sub-committee will be how best to use the ACCESS website, and the possibility of adding W-2 and Child Care eligibility information to it.

### Medicare Part D

CMS and SSA are developing an outreach plan for Medicare Part D and the Low Income Subsidy program. A mass mailing to low-income subsidy recipients will be sent out May 25<sup>th</sup> to around 360,000 WI residents and will include the LIS application and a return envelope from SSA. This mailing to potential LIS eligibles will continue throughout the summer. The dual eligible MA population will receive letters from CMS letting them know they need not apply and when their coverage will begin. Once an applicant has been determined eligible for LIS, s/he must pick a prescription drug plan (PDP) from which to receive their prescription drugs.

CMS and SSA are planning several training events for partner agencies including aging groups, and senior centers. DHFS asked if local IM agencies would be interested in receiving information about attending these trainings, and if the information should be sent from DHFS for directly from CMS. Local agencies agreed that a notice from DHFS would be the best way to communicate the invitation from CMS.

An Operations Memo and an Administrators Memo are both being written with more information on this new program and how it may affect the local agencies. These memos will include information on requesting examples of the LIS application and the SSA website to where individuals can apply for SSA LIS online. Local agencies also asked if DHFS could put together a Medicare Part D fact sheet, Amy Mendel-Clemens will look into linking the CMS fact sheet to the DHFS webpage.

## Quality Assurance Sub-committee Summary

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### 1. The FS 2<sup>nd</sup> Party Review process, process not fully implemented

- Improvements needed to the sample pull to include more EBD/FS cases
- Follow-up tool used in the Milwaukee Find and Fix needs to be sent out statewide
- The overall completion rate for December was 38%
- Training is needed for local agencies to access IMQA and start using the review process
- Recommended a status report to IMAC to obtain their suggestions to get to full compliance
- John Haine is working with Milwaukee on compliance issues, local management is aware of implementation problems and is taking steps toward full implementation
- Lisa Hanson is monitoring the Balance of the State to do the same
- The committee agreed that the review process is essential to move toward and maintain low error rates
- Area Coordinators will share implementation data with their agencies at regional meetings
- Follow-up at next QAS meeting

### 2. Quality Assurance Plans for 2006

- The committee agreed that more structure is needed in the next QAP
- More planning is needed in future meetings to include language about MA 2<sup>nd</sup> party reviews, setting goals for timely application processing as well as appropriate denials and terminations

### 3. Medicaid Discussion at future meetings-Possible future agenda items are

- MEQC
- PERM
- MA 2<sup>nd</sup> party reviews
- MA training needed
- MA/FS policy alignment
- MA workload issues
- MA benefit recovery